

## **Work Assignment SOW**

**Title: Support for OSEM Sustainability Work: Sustainability Indicators, Metrics, and Other Tools**

**Contractor: IEc, Inc.**

**Contract No.: EP-W-10-002**

**Work Assignment Number: 4-67**

**Estimated Period of Performance:** Date of issuance to September 19, 2014

**Estimated Level of Effort:** 720 hours

### **Key EPA Personnel:**

**Work Assignment COR (WA COR):** Richard Kashmanian  
OP/OSEM MC 1807T  
202-566-2875  
202-566-2200

**Contract Level COR:** Cheryl R. Brown  
CMG/OP (1805T)  
202/566-0940  
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### **Background and Purpose:**

In 2011, EPA asked the National Academy of Sciences for their advice on how EPA could better integrate principles of sustainability into our work. NAS produced a report, referred to as the Green Book, which asserted that sustainability is consistent with EPA's statutory mandates and is also essential to meeting them. In addition, NAS recommended a series of actions EPA could take to carry out its mission in a more sustainable manner.

In 2011 and 2012, EPA held a series of listening sessions to collect stakeholder input on whether and how we should incorporate sustainability into our work. Since December 2012, EPA has been discussing internally how we apply a "sustainability lens" to our work.

As this discussion has proceeded, the EPA Administrator has issued a set of major themes for the Agency's work, including one entitled, "Working Toward A Sustainable Future." EPA is also taking steps to embed sustainability into its new Strategic Plan in three ways: (1) sustainability will be included in the Agency's five strategic goals, objectives, and measures; (2) EPA is proposing a new Cross-Cutting Fundamental Strategy (XCFS) entitled "Working Toward A Sustainable Future;" and (3) EPA is proposing a new Agency Priority Goal (APG) on selecting sustainability indicators. The use of indicators and corresponding metrics can inform policymakers to track progress toward sustainability and make adaptive changes. In addition, the Agency is drafting an

FY 14 Annual Action Plan for the XCFS and an Action Plan for the APG.

The purpose of this Work Assignment is to provide support to EPA as it works to develop sustainability indicators and metrics for energy use, materials use, and water use.

The Agency will build on staff knowledge of and experience with sustainability through multiple forms of in-reach, education, and guidance for incorporating sustainability principles into Agency work in a multi-disciplinary way. We will begin our initial outreach effort with states because they are our co-regulators and critical stakeholders.

OSEM has a lead in EPA's sustainability efforts and needs contractor assistance to help integrate sustainability into the Agency's core work and to conduct in-reach and outreach efforts. Specifically, OSEM needs contractor support in implementing the Action Plans under the XCFS and the APG. OSEM needs assistance with analyses, planning, meeting support, facilitation, and communication, including developing our new cross-agency intra and internet sites. The Contractor shall not duplicate work performed in any previous work assignment.

To undertake the tasks below, it would be helpful if the contractor has experience in working with sustainability indicators and metrics and with environmental databases to help inform EPA which sustainability indicators can be supported with publicly available data.

For planning purposes, the contractor shall anticipate receiving technical directives as part of this SOW.

### **Quality Assurance (QA) Requirements**

Check [ ☐ ] Yes or [ ☒ ] No, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

Work Assignment CORs will provide additional information here, if **Yes** is checked above

### **Tasks and Deliverables:**

The WA COR will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor

shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

### **Task 1 - Prepare Workplan**

The contractor shall prepare a workplan within 15 calendar days of receipt of a work assignment signed by the Contracting Officer. The workplan shall outline, describe and include the technical approach, resources, timeline, and due dates for deliverables, a detailed cost estimate by task, and a staffing plan. The WA COR, Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

#### **Deliverables and schedule under Task 1:**

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 14 calendar days of receipt of comments from the Contracting Officer, if required.**

### **Task 2 – Identify Sustainability Indicators and Metrics [Elements 1 and 3, paras. all, pages 5-9, 10-12]**

At the direction of the WA COR, the contractor shall support the implementation of the XCFS and the APG on sustainability. Specifically, building upon work done by EPA's ORD (especially the document and supporting materials for its report "A Framework for Sustainability Indicators at EPA") and other sources forwarded by the COR and of prior use by the contractor, the contractor shall help EPA identify 6-12 sustainability indicators (and metrics) each for energy use, material use, and water use to measure sustainability per our APG. While there have been previous discussions of sustainability indicators, EPA considers their development to be innovative. These lists of indicators will be presented to an EPA workgroup for feedback. Based on this feedback, the WA COR shall direct the contractor to revise or refresh the 6-12 indicators (and metrics) for energy use, material use, and water use. The WA COR expects up to 2-4 iterations of refining this list of indicators.

The WA COR is authorized to issue technical direction.

The contractor shall provide the following specific deliverables to the WA COR for each technical directive, which will provide more specific deliverable due dates.

#### **Deliverables and schedule under Task 2:**

**2a. Draft list of candidate sustainability indicators and metrics and supporting information for energy use, materials use, and water use, drawing on documents supplied and/or determined by EPA, 3 weeks after receiving technical directions from the WA COR.**

**2b. Updated list and supporting information 1 week after receiving comments from the WA COR.**

**2c. Revised list and supporting information 2 weeks after receiving comments from EPA workgroup via WA COR.**

**2d. Updated revised list and supporting information 1 week after receiving comments from the WA COR.**

**2e. Repeat as determined necessary by WA COR.**

**2f. Additional analyses reports/presentations on other issue areas or areas of related interest 3 weeks after receiving technical direction from the WA COR.**

**Task 3 – Identify Supporting Data Sources [Elements 1 and 3, paras. all, pages 5-9, 10-12]**

At the direction of the WA COR, after the above referenced EPA workgroup develops a draft set of sustainability indicators, the contractor shall identify which indicators have supporting data that are publicly available, identify and describe these data sources, and display the recent trend for each of these indicators (e.g., looking back 5-10 years). If the EPA workgroup develops a revised list of sustainability indicators, the WA COR will request that the contractor shall update this data sourcing exercise. The WA COR expects up to 2-4 iterations of refining this list of indicators.

The WA COR anticipates that the contractor will need to participate in some or all of these workgroup meetings, either in person or by conference call. The WA COR expects at least 2-4 meetings of the workgroup and at least 1-2 meetings of smaller workgroups. The contractor may be requested to provide meeting support, such as preparing background papers, making presentations, taking notes, and preparing a summary of each meeting.

The WA COR is authorized to issue technical direction.

The contractor shall provide the following specific deliverables to the WA COR for each technical directive, which will provide more specific deliverable due dates.

**Deliverables and schedule under Task 3:**

**3a. Draft list of data sources and supporting information for sustainability indicators identified for energy use, materials use, and water use, 3 weeks after receiving technical directions from the WA COR.**

**3b. Updated list and supporting information 1 week after receiving comments from the WA COR.**

**3c. Revised list and supporting information 2 weeks after receiving comments from EPA workgroup via WA COR.**

**3d. Updated revised list and supporting information 1 week after receiving comments from the WA COR.**

**3e. Repeat as determined necessary by WA COR.**

#### **Task 4 - Meeting Support [Element 1, paras. all, pages 5-9]**

At the direction of the WA COR, the contractor shall provide meeting support for EPA's development of sustainability indicators and metrics. EPA's sustainability outreach efforts with sustainability indicators may initially focus on collaboration with states. In addition, the contractor shall assist OSEM in consultations with stakeholders on the sustainability indicators part of our work on the APG. The contractor shall provide meeting support for up to 2-3 meetings with states and/or other external stakeholders. Support could include the following: provide facilitation, conduct analysis, prepare background papers, provide webinar support, take notes, and provide a summary of each meeting. EPA anticipates that these meetings will likely take place in Washington, DC, via webinar, or by conference call. The WA COR anticipates that the contractor shall need to travel to meetings in Washington, DC, and participate in the webinar(s) and conference call(s). Based on discussions at these meetings, there may be feedback loops to Tasks 2 and/or 3 – i.e., additional analyses on identifying sustainability indicators for energy use, materials use, and water use and/or supporting publicly available databases. The WA COR shall request the contractor to prepare a report summarizing the findings and feedback received.

The WA COR is authorized to issue technical direction.

The contractor shall provide the following specific deliverables to the WA COR for each technical directive, which will provide more specific deliverable due dates.

##### **Deliverables and schedule under Task 4:**

**4a. Draft meeting materials 2 weeks after technical direction from the WA COR.**

**4b. Final meeting materials 1 week after receiving comments from the WA COR.**

**Repeat per meeting.**

**4c. Draft report 2-4 weeks after technical direction from the WA COR.**

**4d. Final report 2 weeks after receiving comments from the WA COR.**

##### **Summary of Deliverables and Dates:**

**1a. Workplan within 15 calendar days of receipt of work assignment.**

**1b. Revised workplan within 14 calendar days of receipt of comments from the Contracting Officer, if required.**

**2a. Draft list of candidate sustainability indicators and metrics and supporting information for energy use, materials use, and water use, drawing on documents supplied and/or determined by EPA, 3 weeks after receiving technical directions from the WA COR.**

**2b. Updated list and supporting information 1 week after receiving comments from the WA COR.**

**2c. Revised list and supporting information 2 weeks after receiving comments from EPA workgroup via WA COR.**

- 2d. Updated revised list and supporting information 1 week after receiving comments from the WA COR.**
- 2e. Additional analyses reports/presentations on other aspects of the XCFS and the APG, 3 weeks after receiving technical direction from the WA COR.**
- 2f. Additional analyses reports/presentations on other issue areas or areas of related interest 3 weeks after receiving technical direction from the WA COR.**
  
- 3a. Draft list of data sources and supporting information for sustainability indicators identified for energy use, materials use, and water use, 3 weeks after receiving technical directions from the WA COR.**
- 3b. Updated list and supporting information 1 week after receiving comments from the WA COR.**
- 3c. Revised list and supporting information 2 weeks after receiving comments from EPA workgroup via WA COR.**
- 3d. Updated revised list and supporting information 1 week after receiving comments from the WA COR.**
- 3e. Repeat as determined necessary by WA COR.**
  
- 4a. Draft meeting materials 2 weeks after technical direction from the WA COR.**
- 4b. Final meeting materials 1 week after receiving comments from the WA COR.**
- Repeat per meeting.**
- 4c. Draft report 2-4 weeks after technical direction from the WA COR.**
- 4d. Final report 2 weeks after receiving comments from the WA COR.**